Impact Addressees/Salutations User Manual

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Background Information

The IMPACT Addressee/Salutations module was developed to give users name formats to use for personalizing mailings to their constituents that would conform to a set of University Development standard guidelines.

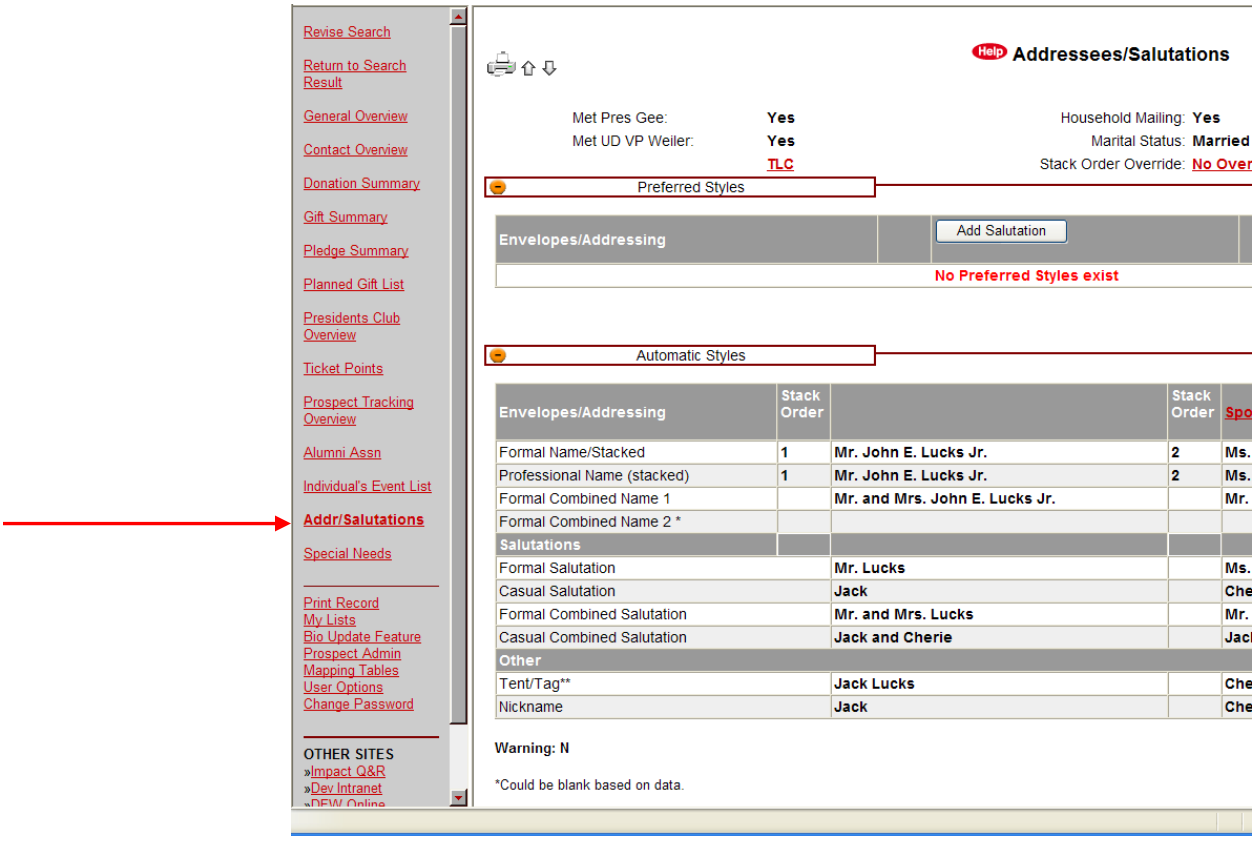
Automatic styles were designed with the intention of meeting the majority of our users needs. However, the design also allows for flexibility to honor our constituents' personal preferences. If the automatic style does not match the constituent's preference, a *Preferred* style can be added to IMPACT that will override the automatic version.

The enhanced IMPACT Addressee/Salutations module was developed with the input of a University Development Salutations Advisory Group who represented a broad variety of University Development departments and campus offices. They put a great deal of effort into considering the myriad needs and options and then streamlined the final product into those they felt would be most useful to the broadest group of users.

The Advisory Group used The *Gregg Reference Manual 10th Edition* as the primary reference for formulating the various styles. This reference was chosen because it is the manual used by the Office of the President. *Letitia Baldridge's New Complete Guide to Executive Manners* was used as a secondary reference where the Gregg Manual was not specific enough.

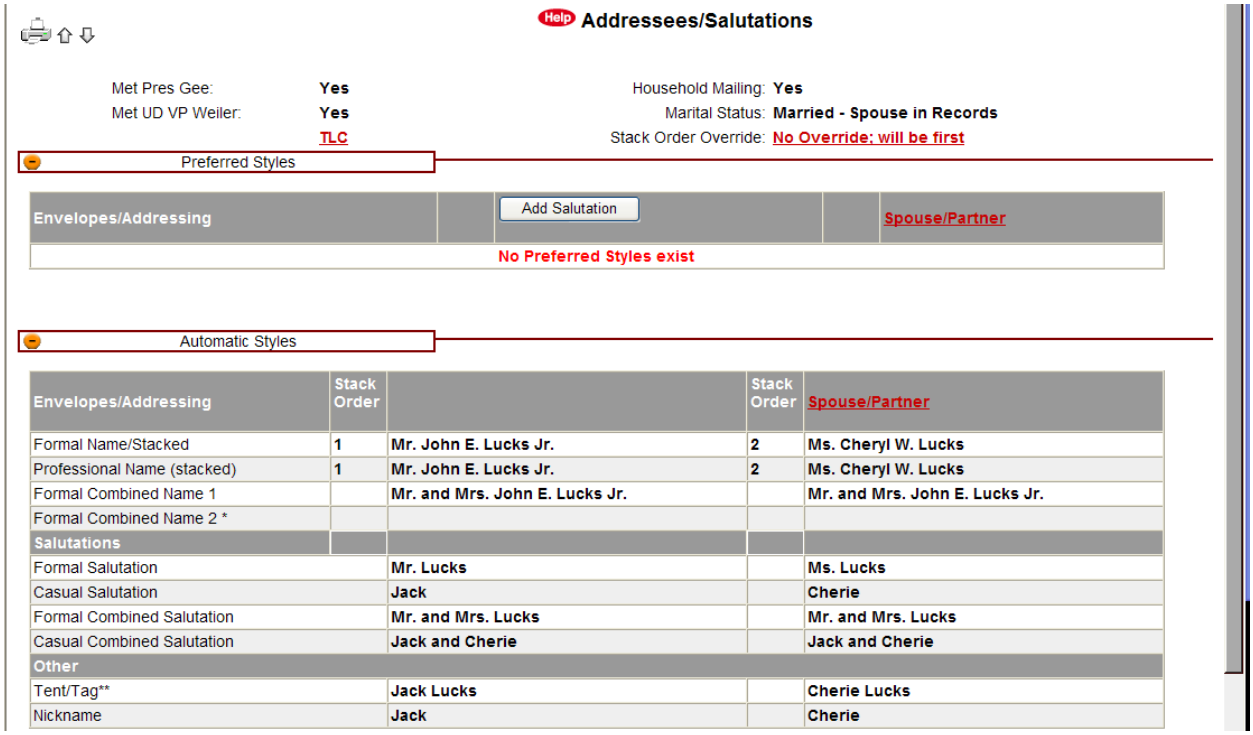
Accessing the Addressees/Salutations Screens

After logging into IMPACT, you can access the Addressees/Salutations screens by clicking on the Addr/Salutations link on the left hand menu bar.



Automatic Styles

IMPACT creates several automatic addressee/salutation styles for each constituent.



Addressees/Salutations

Met Pres Gee: **Yes**
Met UD VP Weiler: **Yes**
TLC

Household Mailing: **Yes**
Marital Status: **Married - Spouse in Records**
Stack Order Override: **No Override; will be first**

Preferred Styles

Envelopes/Addressing		Add Salutation		Spouse/Partner
No Preferred Styles exist				

Automatic Styles

Envelopes/Addressing	Stack Order		Stack Order	Spouse/Partner
Formal Name/Stacked	1	Mr. John E. Lucks Jr.	2	Ms. Cheryl W. Lucks
Professional Name (stacked)	1	Mr. John E. Lucks Jr.	2	Ms. Cheryl W. Lucks
Formal Combined Name 1		Mr. and Mrs. John E. Lucks Jr.		Mr. and Mrs. John E. Lucks Jr.
Formal Combined Name 2 *				
Salutations				
Formal Salutation		Mr. Lucks		Ms. Lucks
Casual Salutation		Jack		Cherie
Formal Combined Salutation		Mr. and Mrs. Lucks		Mr. and Mrs. Lucks
Casual Combined Salutation		Jack and Cherie		Jack and Cherie
Other				
Tent/Tag**		Jack Lucks		Cherie Lucks
Nickname		Jack		Cherie

On the following pages are explanations of the **automatic** styles and how each is intended to be used.

Addressees/Salutations are **not** created for the following:

- Deceased constituents
- Anonymous constituents
- Anyone with constituency code 187 - No University Contact

Automatic Styles are recalculated whenever a change is made to name fields, marital status, deceased date, or when constituency code 187 – No University Contact is added to the record. The styles in IMPACT are refreshed each evening and the newly formulated style will appear in IMPACT the next day.

Please see **Appendix A** for University Development Addressees/Salutations standards that were used to formulate the automatic styles.

Envelopes/Addressing

These styles are intended to be used to address envelopes and mailing labels or for the inside address in a letter.

Formal Name / Stacked	Basic Format: Prefix + First Name + Middle initial + Last Name + Familial Suffix This is the formal version of the **individual name**. You can also use this style to create stacked names for householded records. Examples: Mr. John C. Smith Jr. or Ms. Karen Buckeye "Ms." is the default used for women who do not have a prefix. "Mr." is the default for men who do not have a prefix. Includes familial suffix (Jr., Sr., II, III) with no comma before it. Professional suffix is not included in this style. For military personnel this style includes the military branch and "(Ret.)" if they are retired from the military. Example: Admiral John C. Smith, USN (Ret.)
Professional Name / Stacked	Basic Format: Prefix + First Name + Middle initial + Last Name + Familial Suffix + Professional Suffix This style uses professional suffixes (MD, DDS, Ph.D., CPA…) for individuals when they have one. This style was created for the professional schools and colleges such as Medicine and Dentistry but can be used for any mailing where you want to include the professional suffix. When there is a suffix equivalent to "Dr." (MD, DDS, etc.) then "Dr." drops from the prefix. Example: Carol Abbott, MD **not Dr.** Carol Abbott, **MD** This style can also be used to create stacked names for householded records. Examples: James E. Hayes, MD Karen A. Hayes, DDS
Formal Combined Name 1	This style combines the spouse/partner names. It is designed to be used in combination with the Formal Combined Name 2. Depending on the record, the Formal Combined Name 2 field may be blank. For example, when the name can be combined as "Mr. and Mrs." or "Dr. and Mrs." it will be on one line. Example: Mr. and Mrs. John C. Smith Jr. See below for examples where the 2nd field would be populated.
Formal Combined Name 2	This style is designed to be used in combination with Formal Combined Name 1. It is populated only when 2 lines are needed such as when spouse/partners have different last names, the woman has a special title, or both partners are the same gender. Examples: Mr. John C. Smith Jr. (Formal Combined Name 1) Ms. Karen Buckeye (Formal Combined Name 2) Dr. Karen A. Hayes (Formal Combined Name 1) Mr. James E. Hayes (Formal Combined Name 2) Mr. John C. Smith Jr. (Formal Combined Name 1) Mr. James E. Hayes (Formal Combined Name 2)

Salutations

These styles are intended to be used for the greeting line in a letter.
Example: Dear Mr. and Mrs. Buckeye:

Formal Salutation	Basic Format: Prefix + Last Name. This is the formal version of the **individual** salutation. Examples: Mr. Smith Dr. Hayes Ms. Buckeye Ms. is the default prefix used for women who do not have a prefix. Mr. is the default prefix for men who do not have a prefix. If gender is unknown and no prefix exists, the salutation will default to First Name + Last Name. Example: Pat Jones
Casual Salutation	Casual styles use nickname when there is one, otherwise first name. If the first name is a single initial, this styles uses middle name. If middle name is also an initial, then this field will consist of both initials. If there is not a valid first or middle name or at least 2 initials, this style will be the same as the formal salutation.
Formal Combined Salutation	This style combines the spouse/partner names using a formal format. Examples: Mr. and Mrs. Jones Dr. Johnson and Mr. Johnson Drs. Martin Mr. Smith and Ms. Jones
Casual Combined Salutation	This style combines the spouse/partner nicknames or first names. Examples: Rick and Kathi Cynthia and Richard

Other

Tent/Tag	Used for individual name tags and table tents. This is considered a casual style. It does not include prefixes or suffixes and uses nickname instead of first name when there is one. This can also be as a casual individual name for lists, etc. Examples: John Smith Karen Buckeye
Nickname	This field displays the nickname that is entered on the General Overview page in IMPACT. It is used to formulate the casual salutations and tent/tag styles.

Please see **Appendix B** for sample screen shots showing examples of how a various records might be populated.

Combined Styles

A combined style is populated only for constituents whose household mailing indicator is "yes." In addition, if a spouse is not in records or is deceased a combined style will not be created.

Note: Spouse/Partners with different preferred mailing addresses, for example when one has preferred business and the other preferred home, their household mailing will be set to "no."

Prefixes

The system accounts for specific prefixes where the salutation prefix will be different from the envelope. See **Appendix C** for a table of such prefixes.

Examples:

Prefix Code	**Envelope**	**Salutation**
RADM	Rear Admiral Robert M. Collins, USN	*Dear Admiral Collins:*
LtCol	Lieutenant Colonel Kenneth J. Binzer	*Dear Colonel Binzer:*
Judge	The Honorable Susan J. Dodd	*Dear Judge Dodd:*

Prefix is defaulted to "Dr." for the formal name formats for a constituent who has any of the following suffixes:

PhD	OD	VMD	DDS
DMD	MD	DC	DPM
DVM	EDD	DO	

Professional Name uses these suffixes and drops "Dr." from the prefix.

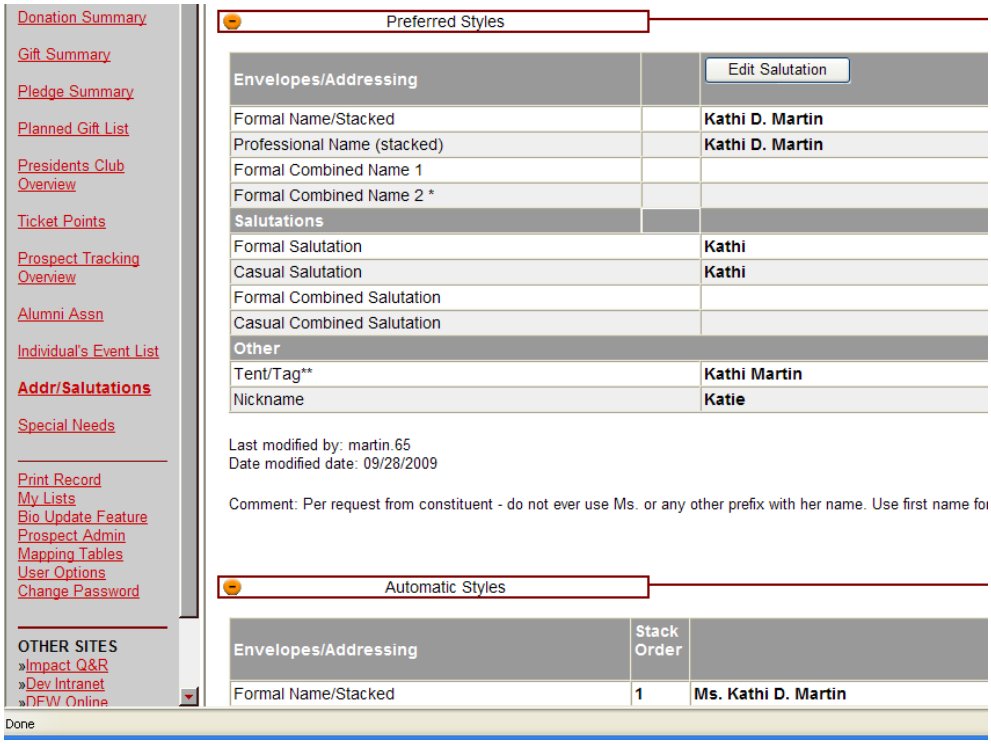
Example: Carol Abbott, MD **not Dr.** Carol Abbott, **MD**

Preferred Styles

The Addressees/Salutations module allows the flexibility to honor a constituent's personal preference. If the automatic style does not match the constituent's preference, a Preferred Style can be added. The preferred style allows us to enter each format exactly how the constituent requests. When a preferred style is added it will override the automatic style in mailing download files.

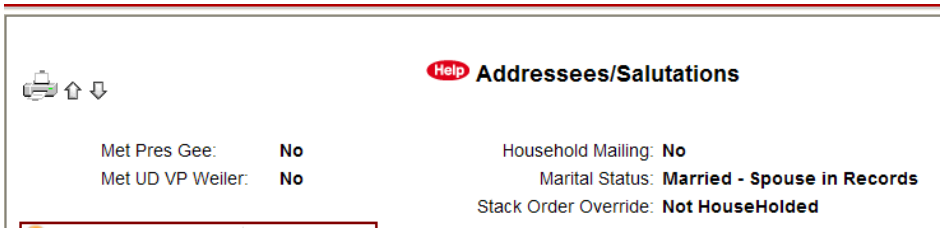
Users who have edit rights to Addressees/Salutations can add a preferred style. Those who do not have edit rights may submit a request to add a Preferred Style by clicking on the Update Biographic Information link found on the General Overview screen in IMPACT. There is not a specific tab for Addressees/Salutations on the Biographic Edit screen but you can enter the request in the comments field on the Name tab. Requests can also be sent via email to the Development Records office at adis@osu.edu.

Please be as specific as possible in stating the constituent's preference. For example, indicate which styles should be changed, what they should be changed to and the specific reason for the request. For example: "Donor requests that we never use 'Ms.' or any other prefix with her name. Please drop "Ms." from envelope styles and use only her first name for salutations."



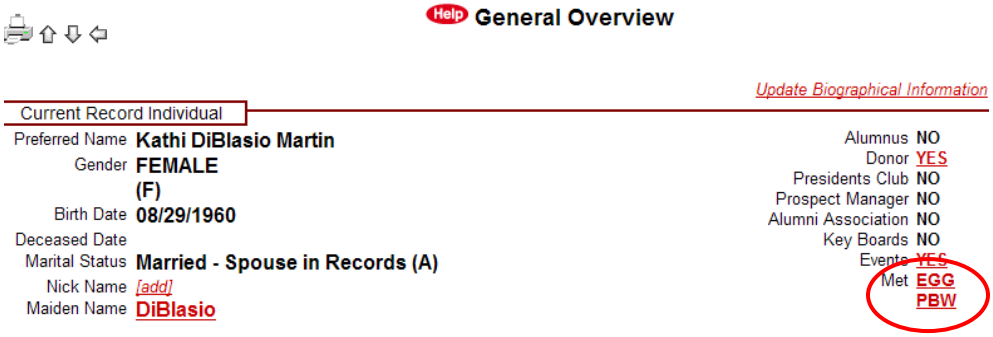
President and SVP "Met" Indicator

At the top of the Addressees/Salutations screen in IMPACT is an indicator that allows us to track which of our constituents the President of the University or the University Development SVP have personally met.


Help Addressees/Salutations
Met Pres Gee: No
Met UD VP Weiler: No
Household Mailing: No
Marital Status: Married - Spouse in Records
Stack Order Override: Not HouseHolded

The intention of this "met" indicator is to help those who write letters on behalf of the President or SVP determine which salutation to use in a letter. For example, if the President has met the person, they will use a casual salutation rather than a formal one.

This indicator also appears on the General Overview screen in IMPACT. At the top right of the screen either the President or SVP's initials (or both) will appear next to the word "Met."



Please see the next section for details on how the indicator is automatically updated.

Automatic Updates to the "met" indicators

The "met" indicators are automatically updated in a number of ways:

IMPACT Contact Reports

The indicator will automatically update to "yes" when the President or UD SVP's ID number is entered in the *Contacted By* field for a contact report that has the following Contact Methods:

- Face to Face
- Personally scheduled visit
- Event*

*Note: during conversion to this module, Contact Reports that occurred before 7/1/2007 with the Contact Method of "Event" did not update the "met" indicator because this was before the Events module went online. Prior to that time a contact report may have been used merely to indicate the constituent's attendance at the event and would not necessarily be a "personal" contact. After that date, a contact report should only be logged as an event if it were a small gathering in which there was actually interaction between the attendees and the persons in the "Contacted by" list.

IMPACT Events

The indicator will also be automatically updated to "yes" for the University President when the constituent attends an event for which the *Met President* indicator was marked "yes" in the Events module.

Manual Updates

The indicator can be updated manually on Addressees/Salutations screen in IMPACT by users who have edit rights to this screen.

Note: It is important to remember that a "No" for the met indicator means only that the indicator has not been updated. A "No" may require further investigation to determine whether the President or SVP has met the constituent.

Stack Order

The stack order indicator is populated for married constituents whose household mailing flag is "Yes." This tells you which spouse name will be listed first for combined or stacked formats.

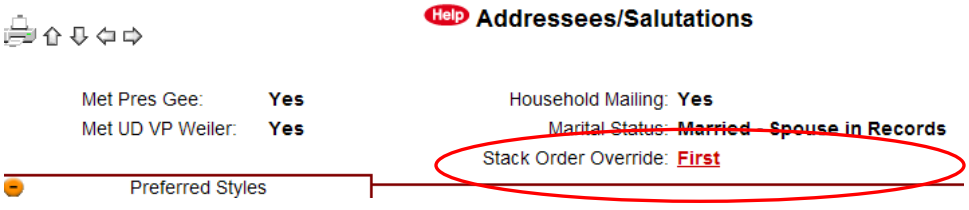
Envelopes/Addressing	Stack Order		Stack Order	Spouse/Partner
Formal Name/Stacked	2	Ms. Cynthia L. Plummer	1	Mr. Douglas A. Plummer
Professional Name (stacked)	2	Ms. Cynthia L. Plummer	1	Mr. Douglas A. Plummer
Formal Combined Name 1		Mr. and Mrs. Douglas A. Plummer		Mr. and Mrs. Douglas A. Plummer
Formal Combined Name 2 *				

The automatic formats use the following logic to determine the order:

1) Prefix rank – highest rank listed first
   For instance, Dr. is considered a higher rank than Mr. so in the following example the Dr. would be listed first.
   Dr. Karen Buckeye
   Mr. Bruce Buckeye
   Dear Dr. Buckeye and Mr. Buckeye
   or Dear Karen and Bruce
2) If prefixes are Mr. and Mrs., Mr. comes first
3) If prefixes are equal and not Mr. and Mrs., then look at Alumni Status. The alum is listed first.
4) If both are alums, then we default to IMPACT ID number order (lowest ID first).

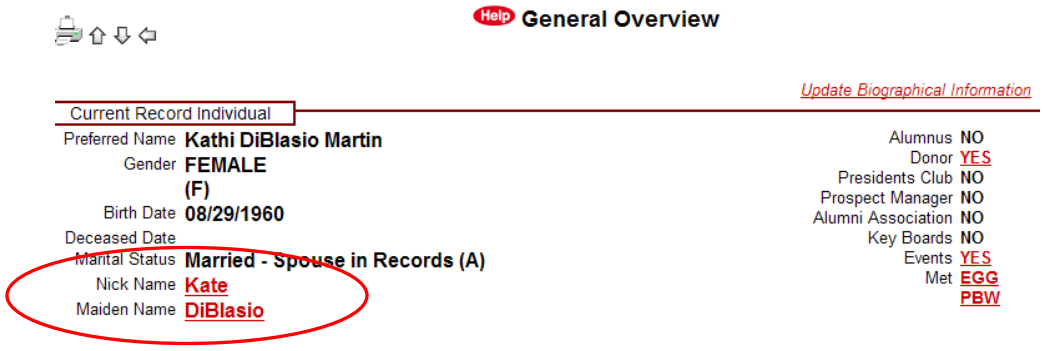
Stack Order Override

The order can be overridden for the automatic styles. **The override should be used to satisfy a constituent's preference.** The override will change the default order for **all** users. In other words, you can't have one order for mailings from Law and another order for mailings from Arts & Sciences. Those who have edit rights to Addressees/Salutations can click on the override link to change the order or you can send a request to Development Records at adis@osu.edu.



Nickname / Maiden Name

Nickname and maiden name fields can now be entered in IMPACT by those who have edit rights to salutations. These fields are displayed on the General Overview screen.



When a nickname is entered, it will be used to populate the casual styles for salutations. Note that the automatic styles on the addressees/salutations page are recalculated each night based on changes made to the database that day that might affect the formats. Therefore when a nickname is added, it will not display properly in the automatic styles until the next day.

Maiden name can be added, however, it is not currently used in any of the addressees/salutations formats.

IMPACT Q&R Download Files

Addressee/Salutation fields are used in the following IMPACT Q&R download reports:

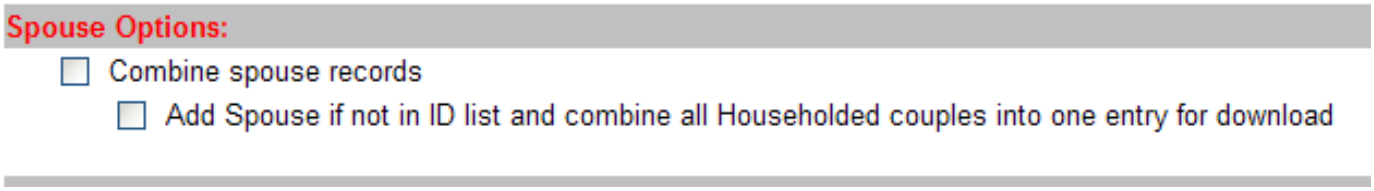
- Postal Address Mail Merge File (BG05)
- Avery Format 5160, 5660 Mailing Labels (BG03)
- Gift Thank You Mail Merge File (GF01)

This document is intended to specifically address the use of addressee/salutation fields for these reports. Please see the IMPACT Q&R Users Manual for more information on running reports and queries.

Links to Microsoft Word templates for use with these download files can be found on the development training web site:
https://www.ud.osu.edu/UDweb/Training/index.htm

Spouse Options

For the **Postal Address Mail Merge File** there are 2 spouse option checkboxes that determine how spouse records are combined for the mailing.


Spouse Options:
Combine spouse records
Add Spouse if not in ID list and combine all Householded couples into one entry for download

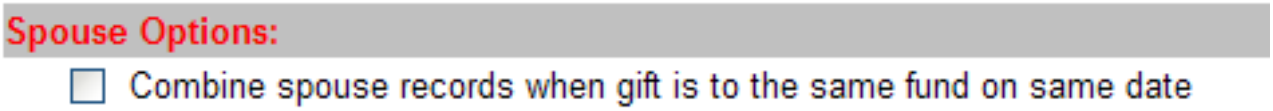
When you leave **both check boxes blank:**
Spouses will not be combined. You will get a separate row for each ID in your query list.

When you **check the first box** (Combine spouse records):
If the both spouse IDs are in your query ID list, they will be combined into one row in the mail merge file and you will get the combined formats for Addressees and Salutations.

When you **check the second box** (Add Spouse if not in ID list):
You will get combined formats for Addressees and Salutations in your mail merge file for anyone in the query ID list as long as they have a spouse in records and the household mailing indicator is marked “yes.” In addition, if both spouse IDs are in the query ID list, they will be combined into one row. You’ll notice that when you check the second box, the first box is automatically checked for you.

For **Avery Format Mailing Labels** there are 2 spouse option checkboxes that determine how spouse records are combined for the mailing. These check boxes combine spouse records in the same way that the Postal Address Mail Merge File with one difference: Avery Format Mailing Labels use the Formal Name/Stacked Envelope style from Addressees/Salutations.

For the **Gift Thank You Mail Merge File** there is only one spouse option check box:



When you check this box, spouse records will be combined into one row only when there is a gift from both with the same fund and the same date. In those cases, you will get the combined formats for Addressees and Salutations.

Mail Merge Fields

This section offers a brief explanation of the Addressees/Salutations fields included in the **Postal Address Mail Merge File** and the **Gift Thank You Mail Merge** file.

Refer to **Appendix D** for a complete list of the fields included in each these files.

Envelope Formats

You have 3 different envelope formats to choose from in the download files. These fields can be used for envelopes, mailing labels or the inside address of a letter.

Formal:	Merge_Env_Formal_Name1 Merge_Env_Formal_Name2
Professional:	Merge_Env_Prof_Name1 Merge_Env_Prof_Name2
Stacked:	Merge_Env_Stacked1 Merge_Env_Stacked2

Note that each of these formats has 2 fields associated with it. **These pairs should be used together** even though the second one may be blank for some records. Microsoft Word or almost any merge tool you use will compensate for blank fields so that you don't get blank lines.

Salutation Formats

You have 2 different salutation formats to choose from in the download files. You can choose either the formal or casual option. These are used for the greeting line a letter. Dear _____

Formal: Merge_Salutation_Formal
Casual: Merge_Salutation_Casual

Note: If you want some people in your file to be greeted formally and others casually, then you would need to manually manipulate the file to move the appropriate name into one column before doing the merge.

Note: when sending the file to an outside mailing house, be sure to specify which fields they should use for your envelopes and salutations.

Table Tents and Name Tags

The table tent and name tag formats are included in the file in case you want to use them. Again these are in pairs, 1 for each member of a couple if you have included spouses.

Merge_Tent/Tag1
Merge_Tent/Tag2

Warning and Warning Description

The warning field is the first field in the file. It will be populated to warn you when the addressee/salutation fields might warrant special attention. For instance, if gender is unknown for a record, a proper salutation may not have been formulated. If you look at the Warning Description (the very last field in the file) you will get more detail.

TLC and TLC Url

If a record is marked TLC, that indicator is included in the file along with the URL that will take you to the TLC screen for the record. If your file contains TLC records, you should check the TLC screens to see if any special handling might apply to your mailing. You can copy and paste the url into your browser to get to the screen. Hint: do not include the apostrophe at the beginning and end of the field when pasting into your browser.

Other Fields

A number of other fields are included in the file that you may find useful. For example, all of the individual name fields (prefix, first, middle, last, suffix, nickname, etc.) for the primary ID and the spouse ID (if applicable) have been included. Refer to **Appendix D** for a complete list of the fields included.

Appendix A

University Development Addressing Guidelines

Addressing Guidelines impacted by the Addressee/Salutations Module upgrade (as specified by the President's Office / Gregg Reference Manual):

Inconsistencies with the following guidelines have been addressed by the recent upgrades to the Addressees/Salutations module in IMPACT.

1) **Always use a prefix or honorific with a name in an address (Mr., Ms., Dr., etc.).**

Mr. and Mrs. John A. Smith 1234 Buckeye Way Columbus, OH 43221-1234	-not-	John and Suzy Smith 1234 Buckeye Way Columbus, OH 43221-1234

2) **Middle initials, if known, should be included with the first name in an address.**

3) **If spouse or partner has a different last name, list their full name separately.**

Ms. Karen F. Buckeye and Mr. James A. Hayes

– or –

Ms. Karen F. Buckeye
Mr. James A. Hayes

4) **Include the familial suffix (Jr., Sr., II, III, IV, etc.) after the last name if known. Do not put a comma between the last name and familial suffix.**

Mr. James A. Hayes Jr.

Dear Mr. Hayes

5) **For military personnel, use the appropriate military honorific and include the military branch after the last name or familial suffix. If the person is retired from the military add "(Ret.)" after the military branch.**

Lieutenant Colonel William M. Jones Sr., USAF
Dear Colonel Jones

Admiral John C. Smith, USN (Ret.)
Dear Admiral Smith

6) **When gender is unknown no honorific is used and the salutation includes the first and last name. Effort should be made to determine gender whenever possible.**

Individual:	Pat Jones Dear Pat Jones:
Couple:	Tracy and Pat Jones Dear Tracy and Pat Jones - or – Dear Tracy and Pat
One gender unknown:	Dr. Julie Richter Tracy Richter Dear Dr. Richter and Tracy Richter

Samples of addressing and salutation standards:

The following addressing and salutation guidelines and standards are recommended. There will be situations when these standards don't work or need to be reviewed. You need to check everything you mail, and use your best judgment. The Office of Donor Relations has staff available to help answer questions on addressing and salutations.

Donor preference should be observed as the first standard!

I. Mailing to an Individual:

	Individual male:	**Individual female:**
Envelope:	Mr. James A. Hayes	Ms. Karen F. Hayes
Salutation:	Dear Mr. Hayes -or- Dear Jim *	Dear Ms. Hayes -or- Dear Karen *
Envelope:	Dr. James A. Hayes	Dr. Karen F. Hayes
Salutation:	Dear Dr. Hayes -or- Dear Jim	Dear Dr. Hayes –or- Dear Karen
Envelope:	The Honorable James A. Hayes	The Honorable Karen F. Hayes
Salutation:	Dear (Senator, Mayor, Judge, etc) Hayes –or- Dear Jim	Dear (Senator, Mayor, Judge, Etc) Hayes –or- Dear Karen
Envelope:		Mrs. James A. Hayes (married)
Salutation:		Dear Mrs. Hayes *Use only on request of individual*
Envelope:		Mrs. Karen A. Hayes (divorced)
Salutation:		Dear Mrs. Hayes *Use only on request of individual*

**It is appropriate to use the recipient's given name or nickname in the salutation if they are familiar to the writer*.

II. When mailing to a couple with the same last name and equal prefixes of Mr. and Mrs., -OR- the man's prefix is greater and the woman's is Mrs., the man's name/info will come first:

Envelope:	Mr. and Mrs. James A. Hayes
Salutation:	Dear Mr. and Mrs. Hayes
Envelope:	Dr. and Mrs. James. A. Hayes
Salutation:	Dear Dr. and Mrs. Hayes
Envelope:	Colonel and Mrs. James. A. Hayes
Salutation:	Dear Colonel and Mrs. Hayes
Envelope:	The Honorable and Mrs. James A. Hayes
Salutation:	Dear (Senator, Mayor, Judge, Etc.) and Mrs. Hayes

III. When mailing to a couple with equal prefixes that are not Mr. and Mrs., split the names (one line or stacked). Sort order applies – alumni and then IMPACT ID.

Envelope: **Dr. James A. Hayes and Dr. Karen F. Hayes**
Salutation: **Dear Drs. Hayes –or– Dear. Dr. Hayes and Dr. Hayes**

Envelope: **Dr. Karen F. Buckeye and Dr. James A. Hayes**
Salutation: **Dear Dr. Buckeye and Dr. Hayes**

Envelope: **Mr. Kenneth F. Smith and Mr. James A. Hayes**
Salutation: **Dear Mr. Smith and Mr. Hayes**

IV. When mailing to a couple with prefixes that are not Mr. and Mrs., the greater prefix comes first:

Envelope: The Honorable James A. Hayes and Dr. Karen F. Hayes
Salutation: Dear (Senator, Mayor, Judge, Etc.) Hayes and Dr. Hayes

Envelope: Dr. Karen F. Hayes and Mr. James A. Hayes *
Salutation: Dear Dr. Hayes and Mr. Hayes

Envelope: The Honorable Karen F. Hayes and Dr. James A. Hayes
Salutation: Dear (Senator, Mayor, Judge, Etc.) Hayes and Dr. Hayes

**Note: When the woman has the greater prefix other than Mrs. the names are listed separately.*

V. When mailing to an individual with an academic or professional suffix, do not add a prefix unless military.

Envelope: **James A. Hayes, MD**
Salutation: **Dear Dr. Hayes**

Envelope: **Captain James A. Hayes, DDS**
Salutation: **Dear Captain Hayes (will be the automatic style)**
Dear Dr. Hayes (manually edit based on purpose of letter)

Additional Addressing Guidelines (not impacted by the Salutations upgrade)
(As specified by the President's Office / Gregg Reference Manual):

Following these guidelines will require manual editing of any data download from IMPACT. Use of the following will depend on the size of the mailing, available staffing and importance of mailed piece.

1) **Use the zip+4 when creating a mailing database for the President's Office.**

2) **Use a two letter state code.**

3) **Don't mail to a couple at a business address, but if the business address is the only one available or the preferred address, don't include business titles for either spouse.**

Dr. and Mrs. James A. Hayes OSU Medical Center 1234 Doan Hall CAMPUS	-or-	Dr. James A. Hayes and Guest OSU Medical Center 1234 Doan Hall CAMPUS

4) **Use only the street address or Post Office Box, never both. If both are available, use the Post Office Box number and spell out Post Office Box.**

5) **Spell out North, South, East and West in the street addresses. Spell out compound directions (Northwest) when they come before the street name and abbreviate without periods as NW when they come after the street name.**

   1234 West Maple Lane -or- 1234 Northwest Boulevard SE

6) **Use the word "One" instead of the figure "1" in a house or building number. Otherwise use figures for all house and building numbers.**

   One Miranova Place -or- One Pennsylvania Avenue

7) **Don't abbreviate Street, Drive, Boulevard, Court, Circle etc. in street addresses. Do abbreviate "Saint" to "St." as in St. John Boulevard.**

8) **Do not abbreviate the words Fort, Mount, Point or Port in a city name. Do abbreviate "Saint" to "St." as in St. Louis.**

9) **If mailing to a Columbus campus mailing address, insert "CAMPUS" instead of city, state and zip code.**

Using names of couples in lists:

Guest lists can be created from IMPACT downloads. There are various opinions on which name to put first when listing a couple. Neither reference manual used specifies a definite rule. If you are creating a list for donor recognition purposes, donor preference should be observed.

IMPACT uses the following order rules for the automatic addressee/salutation styles:

1) Prefix rank – highest rank listed first
   For instance, Dr. is considered a higher rank than Mr. so in the following example the Dr. would be listed first.
   Dr. Karen Buckeye
   Mr. Bruce Buckeye
   Dear Dr. Buckeye and Mr. Buckeye
   or Dear Karen and Bruce
2) If prefixes are Mr. and Mrs., Mr. comes first
3) If prefixes are equal and not Mr. and Mrs., then look at Alumni Status. The alum is listed first.
4) If both are alums, then we default to IMPACT ID number order (lowest ID first).

If you want to create a list that consistently puts the woman's name first, then you will need to manually edit the download data.

Alphabetizing:

Hyphenated last names are alphabetized by the name preceding the hyphen. Some women use their maiden names as a middle name but do not hyphenate. Those names are alphabetized by the final/last name:

Karen A. Buckeye	alphabetized under Buckeye
Karen A. Buckeye-Hayes	alphabetized under Buckeye
Karen Buckeye Hayes	alphabetized under Hayes

Appendix B

Sample Screen Shots

Example 1
Married, both doctors, different last names

Current Record **00455337 / Ethel J Keller MD/ Woodland Hills CA 91364**

Addressees/Salutations

Met Pres Gee: **No**
Met UD VP Weiler: **No**
Household Mailing: **Yes**
Marital Status: **Married - Spouse in Records**
Stack Order Override: **No Override; will be first**

Preferred Styles

Envelopes/Addressing	Stack Order	Add Salutation	Stack Order	Spouse/Partner
No Preferred Styles exist				

Automatic Styles

Envelopes/Addressing	Stack Order		Stack Order	Spouse/Partner
Formal Name/Stacked	1	Dr. Ethel J. Keller	2	Dr. Stanley R. Depper
Professional Name (stacked)	1	Ethel J. Keller, MD	2	Stanley R. Depper, MD
Formal Combined Name 1		Dr. Ethel J. Keller		Dr. Ethel J. Keller
Formal Combined Name 2 *		Dr. Stanley R. Depper		Dr. Stanley R. Depper
Salutations				
Formal Salutation		Dr. Keller		Dr. Depper
Casual Salutation		Ethel		Stanley
Formal Combined Salutation		Dr. Keller and Dr. Depper		Dr. Keller and Dr. Depper
Casual Combined Salutation		Ethel and Stanley		Ethel and Stanley
Other				
Tent/Tag**		Ethel Keller		Stanley Depper
Nickname				

*Could be blank based on data.

**Note: Tent/Tag can be used as a casual individual name.

Example 2
Married Couple, household = yes, same last name, no prefixes

Current Record **00056789 / John Emil Lucks Jr/ Columbus OH 43209**

Addressees/Salutations

Met Pres Gee: **Yes**
Met UD VP Weiler: **Yes**
TLC

Household Mailing: **Yes**
Marital Status: **Married - Spouse in Records**
Stack Order Override: **No Override; will be first**

Preferred Styles

Envelopes/Addressing	Stack Order	Add Salutation	Stack Order	Spouse/Partner
No Preferred Styles exist				

Automatic Styles

Envelopes/Addressing	Stack Order		Stack Order	Spouse/Partner
Formal Name/Stacked	1	Mr. John E. Lucks Jr.	2	Ms. Cheryl W. Lucks
Professional Name (stacked)	1	Mr. John E. Lucks Jr.	2	Ms. Cheryl W. Lucks
Formal Combined Name 1		Mr. and Mrs. John E. Lucks Jr.		Mr. and Mrs. John E. Lucks Jr.
Formal Combined Name 2 *				
Salutations				
Formal Salutation		Mr. Lucks		Ms. Lucks
Casual Salutation		Jack		Cherie
Formal Combined Salutation		Mr. and Mrs. Lucks		Mr. and Mrs. Lucks
Casual Combined Salutation		Jack and Cherie		Jack and Cherie
Other				
Tent/Tag**		Jack Lucks		Cherie Lucks
Nickname		Jack		Cherie

*Could be blank based on data.

**Note: Tent/Tag can be used as a casual individual name.

Example 3
Single, first name is initial

Current Record **00547875 / Dr E Gordon Gee / Columbus OH 43210**

Addressees/Salutations

Met Pres Gee: **Yes**
Met UD VP Weiler: **No**
TLC

Household Mailing: **No**
Marital Status: **DIVORCED**
Stack Order Override: **N/A**

Preferred Styles

Envelopes/Addressing	Stack Order	Add Salutation	Stack Order	No Spouse
No Preferred Styles exist				

Automatic Styles

Envelopes/Addressing	Stack Order		Stack Order	No Spouse
Formal Name/Stacked	1	Dr. E. Gordon Gee		
Professional Name (stacked)	1	Dr. E. Gordon Gee		
Formal Combined Name 1		Dr. E. Gordon Gee		
Formal Combined Name 2 *				
Salutations				
Formal Salutation		Dr. Gee		
Casual Salutation		Gordon		
Formal Combined Salutation		Dr. Gee		
Casual Combined Salutation		Gordon		
Other				
Tent/Tag**		E. Gordon Gee		
Nickname				

*Could be blank based on data.

**Note: Tent/Tag can be used as a casual individual name.

Appendix C

Prefixes

The system accounts for specific prefixes where the salutation format will be different from the envelope format. See the examples below:

Prefix Code	Envelope Format	Salutation Format [
RADM	Rear Admiral	Admiral
VADM	Vice Admiral	Admiral
BRGEN	Brigadier General	General
LTCOL	Lieutenant Colonel	Colonel
LTGEN	Lieutenant General	General
LTG	Lieutenant General	General
LTJG	Lieutenant	Lieutenant
1LT	First Lieutenant	Lieutenant
1stlt	First Lieutenant	Lieutenant
1SG	First Sergeant	Sergeant
1SGT	First Sergeant	Sergeant
2LT	Second Lieutenant	Lieutenant
2NDLT	Second Lieutenant	Lieutenant
SFC	Sergeant First Class	Sergeant
TSGT	Technical Sergeant	Sergeant
AMB	The Honorable	Ambassador
MAYOR	The Honorable	Mayor
LTGOV	The Honorable	Lieutenant Governor
MAG	The Honorable	Magistrate
HON	The Honorable	The Honorable
JUDGE	The Honorable	Judge
GOV	The Honorable	Governor
REP	The Honorable	Representative
SEN	The Honorable	Senator
SYSGT	Gunnery Sergeant	Sergeant
1SG	First Sergeant	Sergeant
1SGT	First Sergeant	Sergeant
SSGT	Staff Sergeant	Sergeant
LCDR	Lieutenant Commander	Commander

Examples:

Prefix	Envelope	Salutation
RADM	Rear Admiral Robert M. Collins, USN	*Dear Admiral Collins:*
LtCol	Lieutenant Colonel Kenneth J. Binzer	*Dear Colonel Binzer:*
Judge	The Honorable Susan J. Dodd	*Dear Judge Dodd:*

Appendix D

Postal Address Mail Merge File Fields

Field Name	Notes
Warning	
ID	
Spouse_ID	Shows when requested/or included
ACS_Key_Line	United States Postal Service Address Change Service
Merge_Env_Formal_Name1	Formal Name of individual or Formal Combined Name for couple
Merge_Env_Formal_Name2	May be blank if both names appear in Formal Name1 or not householded
Merge_Env_Prof_Name1	Professional name of individual
Merge_Env_Prof_Name2	Professional name of spouse (may be blank depending on spouse option chosen)
Merge_Env_Stacked1	Formal Individual name for 1st ID
Merge_Env_Stacked2	Formal Individual name for 2nd ID (depending on spouse option chosen)
Org Name	
Street1	
Street2	May be blank
City	
State	
Zip	
Merge_Salutation_Formal	prefix + Last Name or formal combined salutation for couple
Merge_Salutation_Casual	Nickname if exists, otherwise first name
Merge_Tent/Tag1	Nickname if exists otherwise first name + lastname
Merge_Tent/Tag2	May be blank if both names are not in ID List
Prefix	
NickName	
FirstName	
MiddleName	
LastName	
Suffix	
SuffixMilitary	Military branch based on Industry code (ex: USAF, USN)
SuffixRetMilitary	(Ret.) if retired from a military branch
Gender	U = unknown
DateOfBirth	If known
MaritalStatus	
HouseholdFlag	Yes/No Indicator
HouseholdKey	ID's Merged together for sorting purposes
AlumniFlag	Yes/No Indicator
Spouse_Prefix	NOTE: spouse fields may be blank depending on spouse option chosen
Spouse_NickName	
Spouse_FirstName	

Spouse_MiddleName	
Spouse_LastName	
Spouse_Suffix	
Spouse_SuffixMilitary	
Spouse_SuffixRetMilitary	
Spouse_Gender	
Spouse_DateOfBirth	
Spouse_AlumniFlag	
Sort_LastName	
Sort_FirstName	
Sort_MiddleName	
TLC	Indicates special attention is needed
TLC_URL	Web address to see TLC information
Spouse_TLC	Indicates special attention is needed
Spouse_TLC_URL	Web address to see TLC information
Warning_Description	Information regarding special information for this ID

Gift Thank You Mail Merge File Fields

Field Name	Notes
Warning	
ID	
Spouse_ID	Shows when requested/or included
ACS_Key_Line	United States Postal Service Address Change Service
Merge_Env_Formal_Name1	Formal Name of individual or Formal Combined Name for couple
Merge_Env_Formal_Name2	May be blank if both names appear in Formal Name1 or not householded
Merge_Env_Prof_Name1	Professional name of individual
Merge_Env_Prof_Name2	Professional name of spouse (may be blank depending on spouse option chosen)
Merge_Env_Stacked1	Formal Individual name for 1st ID
Merge_Env_Stacked2	Formal Individual name for 2nd ID (depending on spouse option chosen)
Org Name	
Street1	
Street2	May be blank
City	
State	
Zip	
Merge_Salutation_Formal	prefix + Last Name or formal combined salutation for couple
Merge_Salutation_Casual	Nickname if exists, otherwise first name
Merge_Tent/Tag1	Nickname if exists otherwise first name + lastname
Merge_Tent/Tag2	May be blank if both names are not in ID List
GiftAmt	
GiftEffDate	
ProjectFund	
ProjectName	
ProjectLongName	
CampaignDesc1	
CampaignDesc2	
CampaignDesc3	
CampaignDesc4	
InHonor/InMemory	
Credits	Yes/No Indicator
PldgPayment	Yes/No Indicator
GiftDescription	
Prefix	
NickName	
FirstName	
MiddleName	
LastName	
Suffix	
SuffixMilitary	Military branch based on Industry code (ex: USAF, USN)

SuffixRetMilitary	(Ret.) if retired from a military branch
Gender	U = unknown
DateOfBirth	If known
MaritalStatus	
HouseholdFlag	Yes/No Indicator
HouseholdKey	ID's Merged together for sorting purposes
AlumniFlag	Yes/No Indicator
Spouse_Prefix	NOTE: spouse fields may be blank depending on spouse option chosen
Spouse_NickName	
Spouse_FirstName	
Spouse_MiddleName	
Spouse_LastName	
Spouse_Suffix	
Spouse_SuffixMilitary	
Spouse_SuffixRetMilitary	
Spouse_Gender	
Spouse_DateOfBirth	
Spouse_AlumniFlag	
Sort_LastName	
Sort_FirstName	
Sort_MiddleName	
GIK	
TLC	Indicates special attention is needed
TLC_URL	Web address to see TLC information
Spouse_TLC	Indicates special attention is needed
Spouse_TLC_URL	Web address to see TLC information
Warning_Description	Information regarding special information for this ID